

Staff Development & Performance Review: Operating Instructions for the Online System (AberCQ)

Introduction

These operating instructions explain Aberystwyth University's *Staff Development and Performance Review (SDPR)* online system, known as **AberCQ**.

These instructions should be read by both *Reviewee* and *Reviewer* and offer a step-by-step guide to the system.

Please note: these instructions are currently under development and will change. When using AberCQ always refer to the up-to date version available at: <http://www.aber.ac.uk/en/sdpr/>

What is SDPR?

SDPR is the process whereby staff employed by the University can, at least once a year, meet and discuss their role with a *Reviewer*. *Reviewers* are normally line managers, or other suitable colleagues who understand the *Reviewee's* role and who can facilitate an active discussion with the *Reviewee* regarding their work and development needs. The SDPR discussion is conducted over three principal stages:

1. A **review** of the work and development undertaken by the *Reviewee* during the previous year
2. The setting of new **objectives** for the coming year
3. Agreeing a **training and development plan**

Who can view my SDPR information?

SDPR information disclosure will only be available to those directly related to the work of the *Reviewee*.

A. Review, Objectives and Training Needs Analysis:

This information will only be accessible by:

- The *Reviewee*
- The *Reviewer*
- *Second Reviewer*: who is a 'critical friend' ensuring the process is undertaken correctly. *Second Reviewers* may offer guidance to both the *Reviewee* and *Reviewer*.
- *Head of Department (HoD)*: in many cases the HoD will be *Second Reviewer*; however, in larger departments the HoD will have access to SDPR information to enable a full overview of the department for staffing and resourcing.

B. Training Needs Analysis only:

This information will be available to certain support services (CDSAP, Information Services, Health, Safety and Environment), to assist in the planning and resourcing of staff development activities. Although these reports may identify individuals and their developmental requirements they will contain **no** personal details of individual reviews or objectives.

Training

Training is available for all aspects of the *Staff Development and Performance Review* process, including:

- What is SDPR? An introduction for all staff
- SDPR Reviewer Skills Training
- SDPR: Aber CQ Training for All Staff
- SDPR: Aber CQ Training for Reviewers and Second Reviewers

NB: It is **advised** that **all staff** attend the 'What is SDPR? An introduction for all staff' session. However, it is a **requirement** that Reviewers complete the 'SDPR Reviewers Skills Training' before conducting reviews.

Sessions can be booked at: https://stafftraining.bis.aber.ac.uk/sd/list_courses.php

Accessing AberCQ

AberCQ is available to all staff via:

From the **SDPR webpage**

(see: <http://www.aber.ac.uk/en/sdpr/>)

From **AU Staff Record**

(see: <https://staffrecord.aber.ac.uk/en/login.php>)

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Information for Staff

Staff

- About this Page
- Your Sites
- Your Development
- Useful Work Info
- Departments & Services
- Support & Advice
- Research
- Teaching
- Business
- Keeping You Posted
- Health & Wellbeing
- Everyday Info
- Policy & Governance
- Feedback

Home » Staff


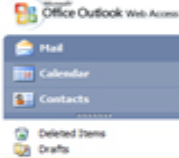
Your Sites

- Staff Record
- Exchange Email Online
- Webmail
- SharePoint
- AStRA & ABW/QLx
- Search Primo, the library catalogue

Your Development

- Career Development
- CDSAP
- IS Training
- Performance Review
- Internal Vacancies

Useful Work Info



Section A: Preparing for the SDPR Meeting

Actioned by

Two Weeks in Advance of the SDPR Meeting

1. The *Reviewer* initiates the SDPR process at least 2 weeks before the meeting. Normally by emailing the Reviewee

Reviewer

2. Once the *Reviewee* has received this e-mail they should:

Reviewee

- 2.1. Access their AU Staff Record at <https://staffrecord.aber.ac.uk/>
- 2.2. Select **Personal Details** from the dropdown menu and update details
- 2.3. Select **Linguistic Survey** from the dropdown menu and update details

3. Now select the **Staff Development and Performance Review** dropdown menu

Reviewee

- 3.1. Access the option **My Review**. You will see the following page:



AU Staff Record

Details for **Robin, the Reviewee**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Staff Development Performance Review

Job/ Role	Action
Training staff, V99998 Other	Performance review
Status: New ()	View Edit review Objectives TDP Final stage
Start your Review.	
Use 'Edit review' to set reviewer and second reviewer emails, set dates and answer questions	

Instructions are provided at each stage to direct Reviewee and Reviewer to the next step in the process

4. Under the **Action** section, select **Edit Review** (NB: this will appear in **red** to indicate that action is required)
- 4.1. You will see the following page:

Reviewee

Staff Development Performance Review

Reviewee: Robin, the Reviewee (99996)
Job/ Role Training staff, V99998 Other

Reviewer:
Second reviewer:

Select email ▼
Select email ▼

Date of current review:

Date of previous review:

Email addresses required on completion of review

Reviewee: 111@aber.ac.uk

Reviewer:

Second reviewer:

Completion date: ☐ Final agree

Completion date: ☐ Final agree

Completion date: ☐ Final agree

Comments (optional)

Reviewee to self-evaluate and respond to all questions and pass draft template back to the Reviewer at least 4 working days prior to agreed meeting:

5. Choose the **Select Email** drop down menu for Reviewer and scroll down until the appropriate name.
- 5.1. Once the name has been highlighted **click the Left Mouse Button** to confirm the selection
- 5.2. **Repeat** this action for the **Second Reviewer**
- 5.3. Now input the **Date of Current Review**. Generally this is the date arranged by the Reviewer for the review meeting. The date format should be **dd-mm-yyyy** format e.g. 01-06-2012
- 5.4. Now input the **Date of Previous Review**. This is the date of your last **Annual Review** meeting. The date format should be **dd-mm-yyyy** format e.g. 01-06-2011
- 5.5. Now Scroll to the bottom of the page and select **Save Changes**

Reviewee

6. You will see the following page:

Status has changed to **20% Editing stage** and includes the date of the last change was made

AU Staff Record

Details for **Robin, the Reviewee**

Personal details

Linguistic Skills Survey

Staff Development Performance Review

Time Allocation Schedule

Staff Development Performance Review

Job/ Role	Action
<div> <div>20%</div> <div>Training staff, V99998 Other</div> </div>	<div> <div>View</div> <div>Edit review</div> <div>Objectives</div> <div>TDP</div> <div>Final stage</div> </div>
<div> <div>Status: Editing stage (30-03-2012)</div> <div>Use 'Edit review' to set reviewer and second reviewer emails, set dates and answer questions</div> </div>	
<div>Not all questions have been answered: #1 #2 #3 #4 #5 #6</div>	

These instructions direct *Reviewee* and *Reviewer* to the next step in the process

Text in **red** indicates actions required. In this case the *Reviewee* must answer questions 1 to 6

[Report a Problem](#) | [Introductory page](#)

7. Under the **Action** section, select **Edit Review**

NB: The Reviewer and Second Reviewer names are automatically completed. These can be changed at present.

7.1. The *Reviewee* **must** now complete the 1st draft of the review by completing questions 1-6: Questions 1-3 *review* work during that year

Reviewee

7.2. Questions 4-6 relate to general *objectives* for the coming year. These should be answered with reference to departmental strategic and operational plans.

7.3. The *Reviewee* should also consider what they wish to achieve in the coming 12 months in terms of performance enhancement and staff development.

NB: This is the **Review** stage only. **Do not** set *SMART objectives* or *training needs* in this section

8. When satisfied that the 1st draft of the Review is complete, the *Reviewee* should tick the box **"Ready for Reviewer"** and then **"Save Changes"**.

Reviewee



9. Once the form is saved, the *Reviewee's* status on the AU Staff Record will change to **Access for Reviewer**

Automatic

9.1. The Review will now automatically be made available to the *Reviewer*

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Logout (Logged in as 111)
Cymraeg

Status has changed to **40% Access for Reviewer** and includes the date the last change was made

AU Staff Record

Details for **Robin, the Reviewee**

Personal details Linguistic Skills Survey Staff Development Performance Review Time Allocation Schedule

Staff Development Performance Review

Job/ Role	Action
<div> <div></div> 40% </div> <p>Training staff, V99998 Other</p> <p>Status: Access for reviewer (30-03-2012)</p> <p>Wait for Reviewer to comment and agree your answers</p>	<p>Performance review</p> <p>View Edit review Objectives TDP Final stage</p>

These instructions direct *Reviewee* and *Reviewer* to the next step in the process

Text is now in **black**. This means the draft review is complete and accessible by the *Reviewer*.
N.B: The *Reviewee* can still **Edit Review** if required.

Report a Problem | Introductory page

10. The *Reviewer* can now access the *Reviewee's* form as follows:

Reviewer

10.1. The *Reviewer* should access their AU Staff Record at <https://staffrecord.aber.ac.uk/>

- 10.2. Select **Staff Development and Performance Review** from the dropdown menu
- 10.3. Access the option **Reviewer**. You will then see the following page:

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Logout (Logged in as 222)
Cymraeg

AU Staff Record

Details for **Fred, the Reviewer**

Personal details | Linguistic Skills Survey | Staff Development Performance Review | Time Allocation Schedule

List of **Reviewees**

Status of each Review

Action available for current stage

Reviewer for:	Job/ Role (Last edited)	Status	Action
Anne, Other - Training staff; V99998 Other	IS (Computing) (30-03-2012)	60% - Objectives stage	View Edit review Objectives
Robin, the Reviewee - Training staff; V99998 Other	Performance review (30-03-2012)	40% - Access for reviewer	View Edit review Objectives

Second reviewer for:

Job/ Role (Last edited)	Status	Action
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Report a Problem | Introductory page

11. The *Reviewer* should now select **Edit Review** from the **Action** section
- 11.1. The *Reviewer* can now comment on the Review in the **text box**

Reviewer

NB: The *Reviewer* **cannot** edit the Review directly. Comments and recommended changes should be made in the text box. These initial comments should be made **before** the Review meeting, in order to save time and create the environment for a more focused conversation.

Staff Development Performance Review

[Move this review to history](#) ☐

Reviewee: Robin, the Reviewee/ 99996
Job/ Role Training staff/ V99998

Reviewer:	Fred, the Reviewer
Second reviewer:	Sal, the Second Reviewer

222@aber.ac.uk
333@aber.ac.uk

Fred, the Reviewer
Sal, the Second Reviewer

Date of current review: 01-04-2012

Date of previous review: 01-04-2011

Email addresses required on completion of review

Reviewer: 111@aber.ac.uk

Completion date:

☐ Final agree

Reviewer: 222@aber.ac.uk

Completion date:

☐ Final agree

Second reviewer: 333@aber.ac.uk

Completion date:

☐ Final agree

Comments (optional)

Reviewee text
(non-editable)

Reviewee to self-evaluate and respond to all questions and pass draft template back to the Reviewer at least 4 working days prior to agreed meeting:

1. What have been your main objectives and activities over the last twelve months (give examples of what your contribution has been e.g. day to day tasks, projects, etc)?

[illegible][illegible][illegible]

Not Set ☒ Reviewer rejected ☐ Agreed ☐

Reviewer comments
(editable)

Review Status

- 12.** For each question the *Reviewer* should select one of three reviewer status options:
- 12.1. Not set:** which indicates to the *Reviewee* that the question is currently under review by the *Reviewer* (the text the *Reviewee* will see on the **status screen** will remain **black**)
 - 12.2. Agree:** which indicates to the *Reviewee* that *Reviewer* is in agreement with the Question (the text the *Reviewee* will see on the **status screen** will be **blue**)
 - 12.3. Reviewer Rejected:** which indicates to the *Reviewee* that *Reviewer* is in agreement with the Question (the text the *Reviewee* will see on the **status screen** will be **red**)

Reviewer

Details for **Robin, the Reviewee**

Current Status **40 % complete**

AU Staff Record

Black indicates that these questions have been agreed

Blue indicates that comments have been made

Red indicates action is required

Red indicates action is required

No text indicates that question is Not Set

These instructions direct Reviewee and Reviewer to the next step in the process

Personal details | Linguistic Skills Survey | Staff Development Performance Review | Time Allocation Schedule

Staff Development Performance Review

Job/ Role: Training staff; V99998 Other

Status: Access for reviewer (04-04-2012)

There are answers in need of change (see rejected records or only commented)

Performance review

Q1: Agreed commented
Q2: Agreed commented
Q3: Agreed commented
Q4: Agreed commented
Q5: rejected commented
Q6:

The checkbox from question 3 is not ticked; wait for reviewer to do

Use 'View' or 'Edit review' to see new information from reviewer (comments or agreed questions)
It will show changes only first time you view it

Start » Answer the questions » Objectives & TDP » Final signatures » Closed

View Edit review Objectives TDP Final stage Print

Report a Problem | Introductory page

13. For each **Reviewer Rejected** question, the *Reviewee* should read the comments and amend the Review and return to the *Reviewer* until consensus is reached.

Both

13.1. If this is not possible before the review meeting, then the *Reviewer* and *Reviewee* should discuss the reasons for not reaching agreement during the meeting.

13.2. When consensus is reached then the *Reviewer* will check the **Agree** button as per section 13.2

13.3. If consensus cannot be reached, then the *Reviewer* will need to refer the question to the *Second Reviewer* for comment and / or decision.

14. When all Questions have been answered by the *Reviewee* or no further action can be taken by the *Reviewer* (see 14 above), then the Review meeting can take place.

Both

Section B: The SDPR Meeting

NB: At no point should the *Reviewer* refer to items or work related issues not agreed on the previous SDPR form, unless, they have been discussed at subsequent inter-review meetings.

This means issues relating to **discipline** must not be referred to in the SDPR process, unless, these issues have been agreed in advance. The *Reviewee* must therefore be fully aware of all issues for discussion and not be surprised by the *Reviewer* with last minute inclusions or issues that should have been dealt with on a daily management basis.

Likewise, the *Reviewee* must not refer to issues of **grievance** or **complaint** unless; these issues have been agreed in advance. The *Reviewer* must therefore be fully aware of all issues for discussion and not be surprised by the *Reviewee* with last minute inclusions or issues that should have been dealt with on a daily management basis.

1. The SDPR meeting should, if possible, take place in a neutral environment, which is neither the *Reviewer's* or *Reviewee's* normal work space. The location of the meeting should be
 - Quiet
 - Free from distractions (computer, mobile telephone, work colleagues).
 - Conducive for a conversation.
 - Set up in a non- hierarchical manner e.g. the *Reviewer* and *Reviewee* should be not sit either side of a desk, but sit in a neutral 'five o'clock position' with a suitable writing surface available if needed.
 - 'Do Not Disturb' sign should be placed on the door
2. Adequate time should be set aside for the meeting. The *Reviewer* should ensure:
 - Time is booked out in their diary.
 - Adequate time is added on for writing up.
 - The meeting should have a defined start and end point

Starting the Meeting

3. The *Reviewer* should welcome the *Reviewee* and ensure they are settled and comfortable before beginning the interview. The *Reviewer* should explain the purpose of the SDPR process and ensure both parties understand what will be discussed and what is not relevant to the process

During the Meeting

4. The *Reviewer* will introduce each of the SDPR questions in turn and discuss with the *Reviewee* their responses to each question:
 - Q1.** Refers to what have been the *Reviewee's* main objectives and activities over the last twelve months. The *Reviewee* should give examples of what contribution they have made e.g. day to day tasks, projects, etc; and how these relate to the department's principal objectives.
 - Q2.** Refers to how well the *Reviewee* has met their objectives met. They should identify factors which contributed to their success or what factors prevented these objectives from being achieved. The *Reviewer* should ask what could you have done differently which may have assisted in the process?
 - Q3.** Refers to the features of the *Reviewee's* role that gave the most/ least satisfaction over the review period. By understanding what motivates the *Reviewee*, the *Reviewer* may be better able to create interesting objectives for the coming review period.

Strategic Alignment: this section is not a question, *per se*, but is an opportunity for both the *Reviewee* and *Reviewer* to consider how the *Reviewee's* work aligns with the department's principal objectives as well as the University's strategic aims (if applicable).

NB: A check box in the *Reviewer* section of AberCQ must be checked by the *Reviewer*, after the meeting. This indicates that departmental strategic objectives were discussed during the meeting.

Q4. Refers to what the *Reviewee* will broadly be expected to achieve in the next 12 months, what are the main objectives and activities likely to be in relation to the team and department's objectives?

NB: Please do not use this section to define SMART objectives. SMART objectives will be recorded during the next stage of the SPDR process.

Q5. Refers to what challenges the *Reviewee* and *Reviewer* may anticipate in meeting these objectives. Mutually agreed strategies for overcoming these challenges can be discussed and recorded in this section.

Q6. Refers to how the *Reviewee* would you like to see their current role develop in relation to their career aspirations within the Unit/School/Team in both short and longer term?

Summarising the Meeting

5. Once the questions have discussed the *Reviewer* and *Reviewee* need to summarise the discussion and set objectives for the forthcoming year. Agreements need to be reached on:

The Review

- Objectives achieved (the measure of performance)
- Objectives which have failed to be achieved and the reasons they were not achieved.
- If required re-setting previous targets with remedial measures to improve the chance of success.

Objective Setting

- Outlined 3-5 SMART objectives for the coming twelve months, aligned to the department's principal objectives which should include:
- Objectives relating to performance enhancement e.g. targets that relate to the improvement of work processes
- Objectives relating to personal development e.g. targets that relate to training and development of the individual

Training & Development Plan

- Defined personal development / training plan

Concluding the Meeting

6. The meeting should conclude on time with a defined plan of actions. **Both parties** must be aware of what actions they are required to undertake, and when these actions must be completed. It is suggested that this is conveyed in an email from the *Reviewer* to the *Reviewee*.

NB: Post Review Tasks are detailed in **Section C: Post Review Tasks**

- Reviewee

2. When complete the *Reviewer* should **Save Changes**

5. The *Reviewee's* screen will change to the following

Reviewee

The screenshot displays the 'AU Staff Record' system interface. At the top, the Aberystwyth University logo is on the left, and the user is logged in as '111' (Cymraeg) on the right. The main header shows 'AU Staff Record'. Below this is a navigation bar with four tabs: 'Personal details', 'Linguistic Skills Survey', 'Staff Development Performance Review' (selected), and 'Time Allocation Schedule'.

The 'Staff Development Performance Review' section is active, showing a progress bar at 60% and a status of 'Objectives stage (04-04-2012)'. The 'Action' menu includes 'View', 'Edit review', 'Objectives' (highlighted in red), 'TDP' (highlighted in red), 'Final stage', and 'Print'. The 'Objectives' section contains instructions: 'No objective have been set yet. One objective is needed at least; this can be set by you or reviewer; the other part must agree on it. Training and development plan can now be edited as needed. You can add up to five requests.' Below this is a list of questions (Q1-Q6) with 'Agreed' status and 'commented' notes.

Annotations with arrows point to specific elements:

- A red box at the top left states: 'Status has changed to 60% Objectives stage'.
- A red box at the top right states: 'Red indicates Objectives and Training & Development Plan need to be completed'.
- A red box at the bottom left states: 'These instructions direct Reviewee and Reviewer to the next step in the process'.

The bottom navigation bar includes 'Report a Problem' and 'Introductory page'.

6. The Reviewee should select **Objectives**

Reviewee

6.1. The following screen will appear:

AU Staff Record

Details for **Robin, the Reviewee**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
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View all

New objective

Exit objectives

Select **New Objective**

6.2. The *Reviewee* should select the **New Objectives** button and complete the form as indicated:

6.2.1. **Objective:** complete the SMART objective in this text box(Specific, **M**easurable, **A**chievable, **R**elevant & **T**ime-bound)
e.g. To develop SDPR *Reviewer* skills, complete SPDR Reviewer Training

6.2.2. **Action:** highlight additional actions required to complete the objective

e.g. Ensure training is booked via the CDSAP website. This will allow me to print a certificate of attendance. This can be used as evidence at my 6 month review to demonstrate completion of this objective.

6.2.3. **Date:** this is the date by which the objective should be completed (the **T** element of SMART). The format should be **dd-mm-yy** e.g. **01-07-2012**

6.3. The *Reviewee* should then select **Save Changes**

Staff Development Performance Review

Objective

Write SMART **Objective** here

Action

Write **Actions** here

By When

Comments

Date for completion

By Whom
111

Status
New

Agreed
☐

Locked
☐

Completed
☐


Cancel

Save changes

Save Changes

NB: The *Reviewee* should create a **New Objective** for each objective set during the meeting

7. The following screen should appear:


Logout (Logged in as 111)
Cymraeg

AU Staff Record

Details for **Robin, the Reviewee**

Personal details
Linguistic Skills Survey
Staff Development Performance Review
Time Allocation Schedule

Objective

Objective	By Whom (Last edited)	Status	Action
To develop SDPR Reviewer skills complete SPDR Reviewer Training	111 (04-04-2012)	 New	Delete Edit Completed

View all
New objective
Exit objectives

1st objective

NB: at this stage the Reviewee can still **Edit** or **Delete** the objective

Report a Problem | Introductory page

8. The *Reviewee* should now repeat the process until all objectives have been set.






8.1. The final screen should appear similar to below:

AU Staff Record

Details for **Robin, the Reviewee**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
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Objective

Objective	By Whom (Last edited)	Status	Action
To develop SDPR Reviewer skills complete SPDR Reviewer Training	111 (04-04-2012)	 New	Delete Edit Completed
Blah, blah, blah. Blah, blah, blah. Blah, blah, blah. Blah, blah, blah. Blah, blah,...	111 (04-04-2012)	 New	Delete Edit Completed
Oh ee, oh, ah, ah, bing, bang, a walla walla, bing, bang.	111 (04-04-2012)	 New	Delete Edit Completed
Lah, de, dah, de, dah. Lah, de, dah, de, dah. Lah, de, dah, de, dah. Lah, de, dah, d...	111 (04-04-2012)	 New	Delete Edit Completed
Yackity, yak, yak, yak. Yackity, yak, yak, yak. Yackity, yak, yak, yak. Yackity,...	111 (04-04-2012)	 New	Delete Edit Completed

Objectives

[View all](#)

[New objective](#)

[Exit objectives](#)

Status

Actions available

9. The *Reviewer* can now access the **Objectives** stage:

9.1. The *Reviewer* should **log in** to AberCQ and then select **Reviewer** from the drop down menu

9.2. The *Reviewer* should then select the **Objectives** button from the **Action** menu






9.3. They will then see the following screen:

AU Staff Record

Details for **Fred, the Reviewer**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
To develop SDPR Reviewer skills complete SPDR Reviewer Training	111 (04-04-2012)	 New	Delete Edit
Blah, blah, blah. Blah, blah, blah. Blah, blah, blah. Blah, blah, blah. Blah, blah,...	111 (04-04-2012)	 New	Delete Edit
Oh ee, oh, ah, ah, bing, bang, a walla walla, bing, bang.	111 (04-04-2012)	 New	Delete Edit
Lah, de, dah, de, dah. Lah, de, dah, de, dah. Lah, de, dah, de, dah. Lah, de, dah, d...	111 (04-04-2012)	 New	Delete Edit
Yackity, yak, yak, yak. Yackity, yak, yak, yak. Yackity, yak, yak, yak. Yackity,...	111 (04-04-2012)	 New	Delete Edit

[View all](#) [New objective](#) [Exit objectives](#)

The reviewer can create a
new objective

The reviewer
can **Edit** an
objective

[Report a Problem](#) | [Introductory page](#)

10. The Reviewer has two options:

- 10.1. **Edit:** which allows the Reviewer to **Comment** on and **Agree** the objective. This is accessed by selecting the **Edit** button of the appropriate **Objective** in the **Action** column
- 10.2. **New Objective:** the Reviewer can set a **New Objective** by selecting this option. If this option

11. If the *Reviewer* chooses to **Edit** an objective the following screen will appear:

Staff Development Performance Review

Objective

To develop SDPR Reviewer skills complete SPDR Reviewer Training

Action

Ensure training is booked via the CDSAP website. This will allow me to print a certificate of attendance. This can be used as evidence at my 6 month review to demonstrate completion of this objective.

By When	By Whom	Status	Locked	Completed/ Completion date
01-07-2012	111	New	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>

The reviewer can add
comments here

Agreed ☐

To **lock** the
objective
the
reviewer
must check
Agreed,
then **Save
Changes**

11.1. Once the *Reviewer* has locked Commented, Agreed and Saved Changed, the objective will be locked and the objectives screen will appear as follows:

NB: This is the *Reviewers* view of
the *Reviewee's* objectives

AU Staff Record

Details for **Fred, the Reviewer**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
Lah, de, dah. Lah, de, dah.Lah, de, dah.Lah, de, dah.Lah, de, dah.	111 (05-04-2012)	Objective agreed 05-04-2012	Delete Edit
Ha, ha, ha, he, he, he. Ha, ha, ha, he, he, he. Ha, ha, ha, he, he, he.	111 (05-04-2012)	Objective agreed 05-04-2012	Delete Edit
To develop SDPR Reviewer skills complete SPDR Reviewer Training	111 (05-04-2012)	Objective agreed 05-04-2012	Delete Edit
La, la, la la, la la, la la, la, la.	111 (05-04-2012)	Objective agreed 05-04-2012	Delete Edit
Once more unto the breach!	111 (05-04-2012)	Objective agreed 05-04-2012	Delete Edit

View all New objective Exit objectives

The reviewer
can still **create**
New Objectives

Status: **Objective agreed**
with date

The reviewer
can still **Edit** the
objectives

12. If the *Reviewee* now logs in they will see the following screen view:

Reviewee

PRIFYSGOL
ABERYSTWYTH
UNIVERSITY

Logout (Logged in as 111
Cymraeg)

Details for Robin, the Reviewee

Personal details | Linguistic Skills Survey | **AU Staff Record** | Training & Development Plan (TDP) | **Final Stage** in red, therefore action required | Time Allocation Schedule

Status 80% Final Agreement Stage

Final Stage in red, therefore action required

Objectives in black, therefore no Action required

These instructions direct Reviewee and Reviewer to the next step in the process

Staff Development Performance Review

Job/ Role	Action
<div> <div></div> <div>80%</div> </div> <p>Training staff, V99998 Other</p> <p>Status: Objectives/ Final agreement (05-04-2012)</p> <p>Use 'Final stage' to sign the final agreement Use 'Objectives' to add more objectives if needed Use 'TDP' to edit training and development plan</p>	<p>Performance review</p> <p>View Edit review Objectives TDP Final stage Print</p> <p>5 objective(s); 5 + 0 agreed & completed Training and development plan can now be edited as needed. You can add up to five requests.</p> <p>No final agreement signatures are present</p> <p>Use 'View' or 'Objective' to see new information from reviewer</p>

Start » Answer the questions » Objectives & TDP » Final signatures » Closed


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13. Before **Final Stage** the *Reviewee* should complete the **Training & Development Plan (TDP)**

Reviewee

13.1. The Reviewee should select the **TDP** button from the **Action Menu**

13.2. The Reviewee should then see the following screen:



Training and Development Plan

Reviewee: Robin, the Reviewee (99996)
Job/ Role Training staff; V99998 Other

The following training plan may be shared with the departmental or central training officers e.g. Health and Safety, Information Services or CDSAP, for the planning of training needs across the institution.

Undertake Staff Development & Performance Review - Reviewer Training. Try to complete training by 01 July 2012

Each Training / Development need should be detailed here

These fields are accessible by the Reviewer only

Empty field

Empty field

Empty field

Empty field

Empty field

Empty field

Cancel Save changes

Changes must be saved

NB: When the *Reviewee* **Saves Changes**, the **Objectives** and **TDP** buttons on the main page will turn **red**. This indicates that the action is require by the Reviewer

14. Once the *Reviewee* saves the **Training & Development Plan (TDP)**, the *Reviewer* can then access it:

Reviewee

14.1. The *Reviewer* should select the **TDP** button from the **Action Menu**

14.2. The *Reviewer* should then see the following screen:



Training and Development Plan

Reviewee: Robin, the Reviewee (99996)
Job/ Role Training staff, V99998 Other

The following training plan may be shared with the departmental or central training officers e.g. Health and Safety, Information Services or CDSAP, for the planning of training needs across the institution.

To develop SDPR Reviewer skills, complete SPDR Reviewer Training. Ensure training is booked via the CDSAP website. Complete training by 01-07-2012

Reviewer comments here

Reviewer selects priority of training need

Please select

Please select

High Priority

Medium Priority

Low Priority

Not approved

15. Once the *Reviewer* **comments**, **prioritises** and **Saves Changes** to the **Training & Development Plan (TDP)**, the review is now into the **Final Agreement** stage.

Reviewer

16. The *Reviewer* and *Reviewee* **both** need to sign off the final Staff Development and Performance Review.

Both

16.1. The *Reviewee* should log on and they will now see this screen view:

AU Staff Record

Details for **Robin, the Reviewee**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Staff Development Performance Review

Job/ Role	Action
<div> <div></div> <div>80%</div> </div> <div>Training staff; V99998 Other</div> <div>Performance review</div> <div>Status: Objectives/ Final agreement (11-04-2012)</div> <div> Use 'Final stage' to sign the final agreement Use 'Objectives' to add more objectives if needed Use 'TDP' to edit training and development plan </div>	<div> View Edit review Objectives TDP Final stage Print </div> <div> 5 objective(s); 5 + 0 agreed & completed 1 training request(s); 1 approved New information for you on Training and development plan </div> <div>No final agreement signatures are present</div> <div> Use 'View' or 'Objective' to see new information from reviewer </div>

Final Stage in red, therefore action required

These instructions direct *Reviewee* and *Reviewer* to the next step in the process

Start » Answer the questions » Objectives & TDP » Final signatures » Closed

17. The *Reviewee* should select the **Final Agreement** stage button.

17.1. The *Reviewee* will then see the following screen

Reviewee

Staff Development Performance Review

Reviewee: Robin, the Reviewee (99996)
Job/ Role Training staff; V99998 Other

Email addresses required on completion of review

Reviewee: Robin, the Reviewee (111@aber.ac.uk)
Reviewer: Fred, the Reviewer (222@aber.ac.uk)
Second reviewer: Sal, the Second Reviewer (333@aber.ac.uk)

Comments (optional)

Completion date:
Completion date:
Completion date:

The Reviewee must select **Final Agree**

☐ Final agree
☐ Final agree
☐ Final agree

Cancel Save changes

Then Save Changes

18. The Reviewer should log on, select **Reviewer** from the drop down menu and then select the **Edit Review** button.
- 18.1. The Reviewer will then see the following screen:

Reviewee

Staff Development Performance Review

Reviewee: Robin, the Reviewee/ 99996
Job/ Role Training staff/ V99998

Reviewer: Fred, the Reviewer
Second reviewer: Sal, the Second Reviewer

Date of current review: 01-04-2012

Date of previous review: 01-04-2011

Email addresses required on completion of review

Reviewee: 111@aber.ac.uk
Reviewer: 222@aber.ac.uk
Second reviewer: 333@aber.ac.uk

Completion date:
Completion date:
Completion date:

The Reviewer must select **Final Agree.**

Move this review to history ☐

Fred, the Reviewer
Sal, the Second Reviewer

☐ Final agree
☐ Final agree
☐ Final agree
(on behalf of second reviewer)

Final comments can also be added

Comments (optional)

19. The *Reviewer* should **Save Changes**.

Reviewee

20. To **close** the Staff Development & Performance Review is the responsibility of the *Second Reviewer*.

Second Reviewer

20.1. The *Second Reviewer* should **log on**

20.2. Select **Reviewer** from the drop down menu. They will now see the following screen view:



Staff Development Performance Review

Reviewee: Robin, the Reviewee/ 99996
Job/ Role: Training staff/ V99998

Reviewer: Fred, the Reviewer
Second reviewer: Sal, the Second Reviewer

222@aber.ac.uk
333@aber.ac.uk

Fred, the Reviewer
Sal, the Second Reviewer

Date of current review: 01-04-2012
Date of previous review: 01-04-2011

Email addresses required on completion of review

Reviewee: 111@aber.ac.uk
Reviewer: 222@aber.ac.uk
Second reviewer: 333@aber.ac.uk

Completion date: 11-04-2012
Completion date: 11-04-2012
Completion date:

☒ Final agree
☒ Final agree
☐ Final agree

Final comments can also be added

Comments (optional)

The *Second Reviewer* must select **Final Agree.**

21. The *Second Reviewer* can make **Comments**, as required.


Second Reviewer

21.1. Once satisfied the *Second Reviewer* should select **Save Changes**. This then **Closes the Review**

NB: If the *Second Reviewer* is unavailable to **Close the Review** the *Reviewer*, ***in exceptional circumstances***, can **Close the Review** on the *Second Reviewer's* behalf.

22. Once the review has been **Closed**, the final screen will appear as follows:

Reviewee



PRIFYSGOL
ABERYSTWYTH
UNIVERSITY

Logout (Logged in as 111)
Cymraeg

AU Staff Record

Details for **Robin, the Reviewee**

Personal details

Linguistic Skills Survey

Staff Development Performance Review

Time Allocation Schedule

Staff Development Performance Review

Job/ Role	Action
<div><div>100%</div><div>Training staff, V99998 Other</div></div>	<div>Performance review</div> <div><div>View</div><div>Edit review</div><div>Objectives</div><div>TDP</div><div>Final stage</div><div>Print</div></div>

Status: Currently closed (11-04-2012)

Use 'Objectives' to mark the completion of an objective

You signed the document (11-04-2012)

Reviewer signed the document (11-04-2012)

Step »» Answer the questions »» Objectives & TDP »» Final signatures »» Closed

The *Reviewee* can still access **Objectives** to register completion. See Section D below for details

Report a Problem

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Section D: Objective Monitoring

1. Once the formal SDPR process has been closed, the *Reviewee* and *Reviewer* can access the **Objectives** stage in order to sign off an objective as **Completed**

Both

Reviewee

1.1. Reviewee Objective Completion Process

1.1.1. The *Reviewee* can **Complete** an **Objective** by following the following steps:

- **Log On** to the **AU Staff Record**
- Select **Staff Development Performance Review** and **My Review** from the drop down menu
- Select **Objectives** from the **Action Menu**
- The *Reviewee* will then see the following screen:



AU Staff Record

Details for **Robin, the Reviewee**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
Objective 4 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit Completed
Objective 3 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit Completed
To develop SDPR Reviewer skills, complete SPDR Reviewer Training	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit Completed
Objective 2 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit Completed
Objective 5 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit Completed

[View all](#) [New objective](#) [Exit objectives](#)

- The *Reviewee* should select the relevant **Objective** and select **Completed** from the **Action Menu**.
- The following screen view will then appear:



Staff Development Performance Review

Objective

To develop SDPR Reviewer skills, complete SPDR Reviewer Training

Action

Ensure training is booked via the CDSAP website. This will allow me to print a certificate of attendance. This can be used as evidence at my 6 month review to demonstrate completion of this objective.

By When

01-07-2012

By Whom

111

Status

Objective agreed

Agreed



Locked



Completed



Comments

Lah, de dah. Lah, de dah. Lah, de dah. Lah, de dah. (by reviewer)

Cancel

Save changes

The *Reviewee* should input the date here and **Save Changes**

- Once the **date** has been entered, an email will be sent to the Reviewer informing them of the **Completed Objective**.

1.2. Reviewer Objective Completion Process

1.2.1. The *Reviewer* can now proceed to the **Sign Off** the **Objective** as **Complete** by following the following steps:

- **Log On** to the **AU Staff Record**
- Select **Staff Development Performance Review** and **Reviewer** from the drop down menu
- Select the required *Reviewee* and **Objectives** from the **Action Menu**
- The *Reviewee* will then see the following screen:



AU Staff Record

Details for **Fred, the Reviewer**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
Objective 4 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit
Objective 3 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit
To develop SDPR Reviewer skills, complete SPDR Reviewer Training	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit
Objective 2 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit
Objective 5 in here	111 (11-04-2012)	Objective agreed 11-04-2012	Delete Edit

[View all](#) [New objective](#) [Exit objectives](#)

- The *Reviewer* should select **Edit** from the **Action Menu**
- The *Reviewer* will then see the following screen:



Staff Development Performance Review

Objective

To develop SDPR Reviewer skills, complete SPDR Reviewer Training

Action

Ensure training is booked via the CDSAP website. This will allow me to print a certificate of attendance. This can be used as evidence at my 6 month review to demonstrate completion of this objective.

By When	By Whom	Status	Locked	Completed/ Completion date	
01-07-2012	111	Objective agreed	<input checked="" type="checkbox"/>	<input type="checkbox"/> 11-04-2012	Agreed <input checked="" type="checkbox"/>

Lah, de dah. Lah, de dah. Lah, de dah. Lah, de dah.

The *Reviewer* check Completed here and **Save Changes**

- Once **Save Changes** has been selected the *Reviewee's* screen view will be change to the following:

AU Staff Record

Details for **Robin, the Reviewee**


Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
Objective 4 in here	111 (11-04-2012)	Objective agreed 11-04-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
Objective 3 in here	111 (11-04-2012)	Objective agreed 11-04-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
To develop SDPR Reviewer skills, complete SPDR Reviewer Training	111 (11-04-2012)	Completed 11-04-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
Objective 2 in here	111 (11-04-2012)	Objective agreed 11-04-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
Objective 5 in here	111 (11-04-2012)	Objective agreed 11-04-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>

2. The *Reviewee* and *Reviewer* should repeat this process until all **Objectives** have been **Signed Off**.

2.1. Once all **Objectives** have been Signed Off the *Reviewee's* Objectives screen will appear as follows:

PRIFYSGOL
ABERYSTWYTH
UNIVERSITY

Logout (Logged in as **111**)
Cymraeg

AU Staff Record

Details for **Robin, the Reviewee**

Personal details	Linguistic Skills Survey	Staff Development Performance Review	Time Allocation Schedule
------------------	--------------------------	--------------------------------------	--------------------------

Objective

Objective	By Whom (Last edited)	Status	Action
Objective 4 in here	111 (11-04-2012)	Completed 01-01-2013	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
Objective 3 in here	111 (11-04-2012)	Completed 01-02-2013	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
To develop SDPR Reviewer skills, complete SPDR Reviewer Training	111 (11-04-2012)	Completed 11-06-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
Objective 2 in here	111 (11-04-2012)	Completed 01-08-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>
Objective 5 in here	111 (11-04-2012)	Completed 11-04-2012	<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Completed"/>

↑

The *Reviewee* can no longer make changes to the **Objectives**

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NB: If SMART objectives have been set well, this should take at around 9-12 months.

Section E: Completing the Review Cycle

1. Once the formal SDPR process has been completed and all **Objectives** signed off, the *Reviewer* must **Complete** the **Review Process** by **Moving the Review to History**. This allows a new SDPR cycle to begin:

Reviewer

1.1. Moving the Review to History Process

1.1.1. The *Reviewer* must complete the following steps:

- **Log On** to the **AU Staff Record**
- Select **Staff Development Performance Review** and **Reviewer** from the drop down menu
- Select the required *Reviewee* and **Edit Review** from the **Action Menu**
- The *Reviewee* will then see the following screen:



Staff Development Performance Review

Reviewee: Robin, the Reviewee/ 99996
Job/ Role Training staff/ V99998

Reviewer: Fred, the Reviewer
Second reviewer: Sal, the Second Reviewer

Date of current review: 11-04-2012

Date of previous review: 01-04-2011

Email addresses required on completion of review

Reviewee: 111@aber.ac.uk
Reviewer: 222@aber.ac.uk
Second reviewer: 333@aber.ac.uk

Completion date: 11-04-2012 ☐ Final agree
Completion date: 11-04-2012 ☒ Final agree
Completion date: 11-04-2012 ☒ Final agree
(on behalf of second reviewer in exceptional circumstances)

Comments can be added here

Comments (optional)

The *Reviewer* must check this tick box 'Move this Review to History'

Move this review to history ☐

Staff Development and Performance Review

Name of Reviewee:		Staff Number:	
Job Role:		Reviewee Email:	
Name of Reviewer:		Reviewer Email:	
Name of Second Reviewer:		Second Reviewer Email:	
Date of Current Review:		Date of Previous Review:	
Q1. What have been your main objectives and activities over the last twelve months (give examples of what your contribution has been e.g. day to day tasks, projects, etc)?			
Q2. How well were your objectives met (give examples of the factors which contributed to your success or otherwise)? What could you have done differently?			
Q3. What features of your job have given the most/ least satisfaction over the last year?			
Strategic Alignment: Please provide a brief summary of departmental objectives as they affect you.			
Q4. Looking ahead to the next 12 months, what are your main objectives and activities likely to be in relation to the team and department's objectives?			
Q5. What challenges do you anticipate in meeting these objectives?			
Q6. How would you like to see your present job, your career and this Unit/School/Team develop in both short and longer term?			

